

## **USDA Weekly Retail Turkey Feature Activity**

## Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/22 thru 10/28.

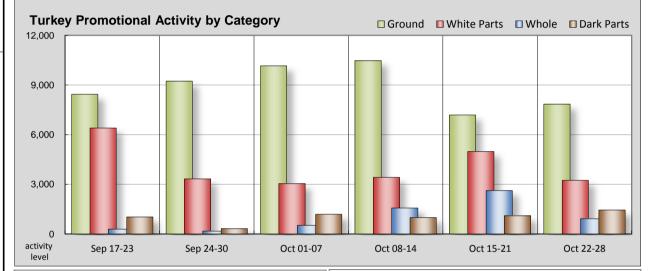
space this week, following the pattern of other breast items.

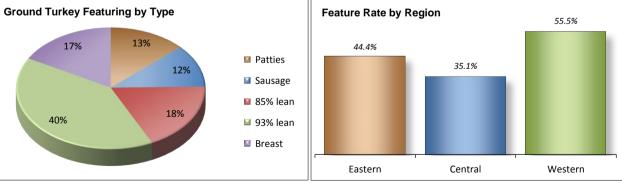
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

| (prices in adiats per pound need difference noted, |            |           |           |           |                 |         |  |  |  |  |  |  |
|--|------------|-----------|-----------|-----------|-----------------|---------|--|--|--|--|--|--|
| NATIONAL SUMMARY                                   |            |           |           |           |                 |         |  |  |  |  |  |  |
|  | THIS       | WEEK      | LAST      | WEEK      | LAST YEAR       |         |  |  |  |  |  |  |
| Feature Rate 1/                                    |            | of 19,200 |           | of 19,200 | 54.1% of 18,600 |         |  |  |  |  |  |  |
|  | outlets    |           |           | tlets     | outlets         |         |  |  |  |  |  |  |
| Special Rate 4/                                    |            | .5%       |           | .0%       | 5.9%            |         |  |  |  |  |  |  |
| Activity Index 2/                                  | _          | ,590      |           | ,190      | 14,930          |         |  |  |  |  |  |  |
| 3/   | Stores     | Wtd Avg   | Stores    | Wtd Avg   | Stores          | Wtd Avg |  |  |  |  |  |  |
| WHOLE BIRDS:                                       |            |           | 000       | 4.00      |                 |         |  |  |  |  |  |  |
| Fresh - Hens<br>" - Toms                           |            |           | 200<br>10 | -         |                 |         |  |  |  |  |  |  |
| - roms<br>Frozen - Hens                            | 260        | 0.01      | -         |           | 1 050           | 0.00    |  |  |  |  |  |  |
| rozen - Hens<br>" - Toms                           | 360<br>560 |           | 1,280     |           | 1,250           |         |  |  |  |  |  |  |
| PARTS:   | 360        | 0.76      | 1,130     | 0.69      | 1,400           | 0.00    |  |  |  |  |  |  |
| Breast:  |            |           |           |           |                 |         |  |  |  |  |  |  |
| Bone-in, whole                                     |            |           |           |           |                 |         |  |  |  |  |  |  |
| Fresh  | 270        | 2.70      | 10        | 2.29      |                 |         |  |  |  |  |  |  |
| Frozen   | 1,050      |           | -         | -         | 870             | 1.37    |  |  |  |  |  |  |
| Hotel Style  | 1,000      | 1.00      | 1,110     | 1.00      | 0,0             | 1.01    |  |  |  |  |  |  |
| Fresh  |            |           |           |           |                 |         |  |  |  |  |  |  |
| Frozen   | 30         | 1.99      | 180       | 1.29      |                 |         |  |  |  |  |  |  |
| Split, bone-in                                     |            |           |           |           |                 |         |  |  |  |  |  |  |
| Fresh  |            |           |           |           |                 |         |  |  |  |  |  |  |
| Rotisserie   | 760        | 6.42      | 1,830     | 7.97      | 310             | 9.38    |  |  |  |  |  |  |
| Boneless, whole                                    | 20         | _         | 290       |           | 40              |         |  |  |  |  |  |  |
| Cutlets  | 470        |           | 920       | _         | 970             |         |  |  |  |  |  |  |
| Cutlets, thin sliced                               | 170        |           | 10        |           | 20              |         |  |  |  |  |  |  |
| Strips   | 60         |           | 10        | 4.33      | 120             |         |  |  |  |  |  |  |
| Tenders  | 410        |           | 300       | 4.80      | 360             |         |  |  |  |  |  |  |
| Marinated Tenders                                  | 600        |           | 1,280     |           | 1,860           |         |  |  |  |  |  |  |
| Drumsticks   | 610        |           | 210       |           | 190             |         |  |  |  |  |  |  |
| Thighs   | 220        |           | 10        |           | 100             | 1.01    |  |  |  |  |  |  |
| Wings  | 380        |           | 280       |           | 50              | 1.69    |  |  |  |  |  |  |
| Necks  | 200        |           | 230       |           | 10              |         |  |  |  |  |  |  |
| Smoked Drumsticks                                  | 20         |           | 180       |           | 70              |         |  |  |  |  |  |  |
| Smoked Wings                                       | 20         | 2.09      | 190       | 2.01      | 40              | 1.69    |  |  |  |  |  |  |
| Smoked Necks                                       |            |           |           |           | 40              | 1.69    |  |  |  |  |  |  |
| GROUND TURKEY:                                     | 7,840      | 2.87      | 7,190     | 2.78      | 7,040           | 2.75    |  |  |  |  |  |  |
| Patties  | 1,040      | 2.67      | 610       |           | 640             |         |  |  |  |  |  |  |
| Sausage  | 900        | 2.93      | 2,180     | 2.63      | 1,250           | 2.51    |  |  |  |  |  |  |
| 85% lean   | 1,420      | 2.02      | 1,060     | 2.16      | 1,220           | 2.05    |  |  |  |  |  |  |
| 93% lean   | 3,150      | 2.64      | 2,410     | 2.59      | 2,950           | 2.71    |  |  |  |  |  |  |
| Breast   | 1,330      | 4.46      | 930       | 4.20      | 980             | 4.07    |  |  |  |  |  |  |
| Rolls (frsh/frz 1 lb.)                             | 540        | 1.86      | 20        | 1.25      | 290             | 1.82    |  |  |  |  |  |  |

## Retail activity on turkey slows for the end of month. Offers on whole birds decrease; average advertised prices are much lower this week. Fresh bone-in breast is more available; promotions on frozen bone-in breast are less active. Prices on both are sharply higher. Frozen hotel style breasts also less active and priced higher this week. Rotisserie breast activity decreases from last week's high level but rotisserie breasts are still widely available and there are some very attractive prices out there. The boneless white parts follow the same trend as the bone-in breasts and the only items more active this week are thin sliced cutlets and tenders. Offers increase on fresh dark parts and drop on smoked parts. Ground turkey is a popular choice for the consumer's tight budget at the end of the month. The 93% lean is the most popular. Ground breast meat is the only ground item that is given less ad

This Week's Turkey Feature Highlights





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>anv</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion

Note: rolls not included in ground fresh ground turkey total and weighted average. (e.g., buy 1, get 1 free, etc.)

Fri. Oct 22, 2010

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 10/22 thru 10/28.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

|                                       | EASTERN U.S. (CT,DC,DE,FL,GA,MA,MD,ME, NC,NH,NJ,NY,PA,RI,SC,VA,VT,WV)                       |            |              | CENTRAL U.S.  |        |         | WESTERN U.S.   |           |         |  |
|---------------------------------------|---|------------|--------------|---|--------|---------|--|-----------|---------|--|
|                                       |   |            |              | (AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,<br>MO,MS,ND,NE, OH, OK,SD,TN,TX,WI)                         |        |         | (AZ,CA,CO,ID,MT,   |           |         |  |
|                                       |   |            |              |   |        | 474     | NM,NV,OR,UT,WA,WY)   |           |         |  |
| Feature Rate 1/                       | 44.4% of 8,400 sampled outlets 6.7% of stores w/ no-price promotions Activity Index = 8,030 |            |              | 35.1% of 6,300 sampled outlets 0.7% of stores w/ no-price promotions Activity Index = 3,410 |        |         | 55.5% of 4,500 sampled outlets                               |           |         |  |
| Special Rate 4/                       |   |            |              |   |        |         | 5.6% of stores w/ no-price promotions Activity Index = 3,150 |           |         |  |
| Activity Index 2/                     |   |            |              |   |        |         |  |           |         |  |
| · · · · · · · · · · · · · · · · · · · | Price Range   |            |              | Price Range Summary   |        |         | Price Range Summary  |           |         |  |
|                                       | (\$/pound)  | Stores     | Wtd Avg      | (\$/pound)  | Stores | Wtd Avg | (\$/pound)   | Stores    | Wtd Avg |  |
| WHOLE BIRDS:                          |   |            |              |   |        |         |  |           |         |  |
| Fresh - Hens                          |   |            |              |   |        |         |  |           |         |  |
| " - Toms                              |   |            |              |   |        |         |  |           |         |  |
| Frozen - Hens                         | 0.49 - 0.99   | 190        | 0.97         | 0.49 - 0.99   | 160    | 0.60    | 1.19   | 10        | 1.19    |  |
| " - Toms                              | 0.49 - 0.79   | 190        | 0.78         | 0.49 - 0.99   | 360    | 0.74    | 1.19   | 10        | 1.19    |  |
| PARTS:                                |   |            |              |   |        |         |  |           |         |  |
| Breast:                               |   |            |              |   |        |         |  |           |         |  |
| Bone-in, whole                        | 2.49 - 2.99   | 250        | 0.70         |   |        |         | 2.29   | 20        | 2.29    |  |
| Fresh<br>Frozen                       | 1.29 - 1.99   | 250<br>550 | 2.73<br>1.95 | 1.29 - 1.99   | 250    | 1.68    | 1.99   | 20<br>250 | 1.99    |  |
| Hotel Style                           | 1.29 - 1.99   | 550        | 1.95         | 1.29 - 1.99   | 250    | 1.00    | 1.99   | 250       | 1.99    |  |
| Fresh                                 |   |            |              |   |        |         |  |           |         |  |
| Frozen                                |   |            |              | 1.99  | 30     | 1.99    |  |           |         |  |
| Split, bone-in                        |   |            |              | 1.00  |        | 1.00    |  |           |         |  |
| Fresh                                 |   |            |              |   |        |         |  |           |         |  |
| Rotisserie                            | 3.74 - 7.99   | 710        | 6.34         | 5.99 - 8.99   | 20     | 6.99    | 7.99   | 30        | 7.99    |  |
|                                       | 3.74 - 7.99   | 710        | 0.34         | 5.99 - 6.99   | 20     | 6.99    |  |           |         |  |
| Boneless, whole<br>Cutlets            | 4.00 4.00   | 370        | 4.64         | 2.00  | 20     | 3.99    | 3.99<br>3.99 - 5.45  | 20<br>80  | 3.99    |  |
| Cutlets, thin sliced                  | 4.00 - 4.99<br>4.99   | 170        | 4.04         | 3.99  | 20     | 3.99    | 3.99 - 3.43  | 80        | 4.26    |  |
| Strips                                | 4.55  | 170        | 4.99         | 3.99  | 20     | 3.99    | 3.99 - 4.54  | 40        | 4.15    |  |
| Tenders                               | 3.99  | 310        | 3.99         | 3.99  | 20     | 3.99    | 3.99 - 4.79  | 80        | 4.13    |  |
| Marinated Tenders                     | 3.73  | 140        | 3.73         | 3.73 - 4.66   | 220    | 3.76    | 3.33 - 4.99  | 240       | 4.34    |  |
| Drumsticks                            | 1.19 - 1.89   | 420        | 1.58         | 1.49  | 190    | 1.49    | 0.00 4.00  | 240       | 7.07    |  |
| Thighs                                | 2.19  | 30         | 2.19         | 1.49  | 190    | 1.49    |  |           |         |  |
| Wings                                 | 1.29 - 1.79   | 380        | 1.57         |   |        |         |  |           |         |  |
| Necks                                 | 1.49  | 10         | 1.49         | 1.49  | 190    | 1.49    |  |           |         |  |
| Smoked Drumsticks                     | 1.89  | 10         | 1.89         | 2.29  | 10     | 2.29    |  |           |         |  |
| Smoked Wings                          | 1.89  | 10         | 1.89         | 2.29  | 10     | 2.29    |  |           |         |  |
| Smoked Necks                          |   |            |              |   |        |         |  |           |         |  |
| GROUND TURKEY:                        |   |            |              |   |        |         |  |           |         |  |
| Patties                               | 2.19 - 2.99   | 700        | 2.61         | 2.49 - 3.79   | 70     | 2.95    | 2.50 - 3.00  | 270       | 2.74    |  |
| Sausage                               | 1.99 - 2.99   | 340        | 2.74         | 2.39 - 3.11   | 260    | 2.83    | 2.87 - 3.50  | 300       | 3.23    |  |
| 85% lean                              | 1.69 - 2.50   | 940        | 2.05         | 1.66 - 2.32   | 340    | 1.93    | 2.08   | 140       | 2.08    |  |
| 93% lean                              | 2.30 - 3.07   | 1,200      | 2.67         | 1.89 - 3.03   | 760    | 2.45    | 2.40 - 2.80  | 1,190     | 2.73    |  |
| Breast (99-100% lean)                 | 3.08 - 4.99   | 690        | 4.31         | 4.39 - 4.83   | 220    | 4.78    | 3.74 - 4.79  | 420       | 4.54    |  |
| Rolls (frsh/frz 1 lb.)                | 0.98 - 2.59   | 420        | 1.99         | 0.88 - 1.50   | 70     | 1.19    | 1.69   | 50        | 1.69    |  |